THE MIDLANDS

- AN ECONOMIC ASSESSMENT

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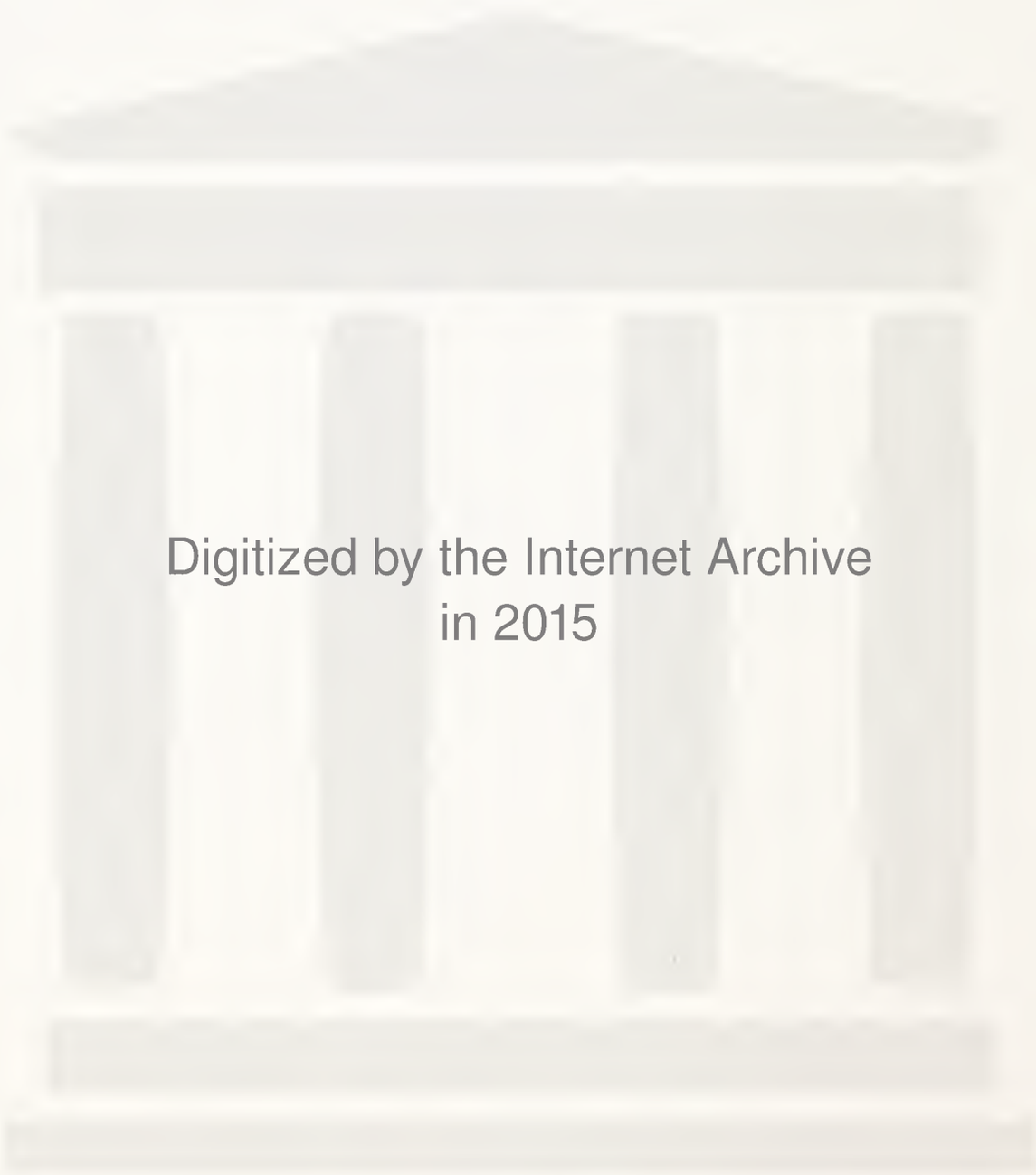
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CONTENTS

1 INTRODUCTION

A Scope

B Methodology

2 EXECUTIVE OVERVIEW

3 ECONOMIC BACKGROUND

A West Midlands

B East Midlands

4 CBI REGIONAL REPORTS

A West Midlands

B East Midlands

5 FOREIGN INVESTMENT IN THE MIDLANDS

6 THE MOTOR INDUSTRY IN THE MIDLANDS

APPENDICES

APPENDIX I Gross Domestic Product by Industry Group

II Local Manufacturing Units (1988)

III Local Units by Region (Manufacturing) 1986

IV Capital Expenditure in Manufacturing

V GDP per Head

VI GDP in Manufacturing Industries

VII Employees in Employment

VIII Average Unemployment Rate

IX Foriegn-owned Manufacturing Enterprises

X The Midlands

CHAPTER 1 - INTRODUCTION

A SCOPE

The scope of this report, as agreed between CAP and INPUT, is to look at the economy in the East and West Midlands viz:-

- investment intentions for the region
- level of investment and intentions in the manufacturing industry (split if possible by vehicle, process, food, etc)
- level of gross domestic product
- size of manufacturing segment.

The administrative regions of East and West Midlands cover an area much wider than that of direct interest to CAP at present (see Appendix X). The area of most interest is mainly within the West Midlands and hence this report places more emphasis on this region.

B METHODOLOGY

This study is based on the following:

- Interviews with senior personnel from
  - CBI London
  - CBI West Midlands, Birmingham
  - CBI East Midlands, Nottingham
  - West Midlands Industrial Development Association (WMIDA), Warwickshire
  - West Midlands Regional Manpower Intelligence Unit, Birmingham
  - East Midlands Regional Manpower Intelligence Unit, Nottingham
  - Engineering Employers Federation (East Midlands), Leics
- Official statistics from the DTI Library and other business libraries
- The Financial Times and other business and general press

Notes (1) The reader who is particularly interested in statistical information is advised to look at the appendices

(2) Where possible, recent figures have been used in this report. It should be remembered, however, that most official statistics are published after a time lag of 2-3 years.

CHAPTER 2 - EXECUTIVE OVERVIEW

- The Midlands has a strong dependance on manufacturing industry.
- There has been a revival in manufacturing industry and the general economy in recent years following the depression of the early 1980's.
- Foreign investment in the West Midlands has increased in the last three years (from a very low base)
- The car manufacturing industry in the Midlands is strong.
- The textiles industry continues to play an important role in the economy of the East Midlands.
- The unemployment rate is down, though the West Midlands remains above the national average.
- GDP per head in the West Midlands is well below the national average.

CHAPTER 3 - ECONOMIC BACKGROUND

A WEST MIDLANDS

The West Midlands region has a total population of 5.1 million and a workforce of approximately 2.3 million. Most of the region's population live in the county of the West Midlands. Due to the importance of the county from a manufacturing point of view, the commentary below deals mainly with this particular part of the region.

The West Midlands with its dependence upon the vehicles, metals and metal bashing industry has become dominated by a massive industrialised area that now effectively extends from Coventry in the south through Birmingham and into the Black Country boroughs of Sandwell, Dudley, Wolverhampton and Walsall.

In the boom times for the motor industry the vulnerability was not exposed of so many jobs reliant upon the giant companies operating in such a narrow range of industries. Unemployment was well below the national average. The region became identified with militant trade unionism and manual workers shot to the top of the pay league.

In the years 1979 to 1984 alone the region lost more than 300,000 manufacturing jobs - greater than the total lost throughout Scotland and Wales. The level of jobless now in the county of the West Midlands, at 15% compares with 6% in 1979.

A recent survey by the European Commisison ranked the county in the terms of low levels of income and employment at 111 out of the 131 administrative areas within the Community.

In 1975 the West Midlands region's GDP per head was second only to that in the South East, but from 1980 to 1983 only Wales and Northern Ireland had lower figures. By 1985 the region also had higher GDP per head than Yorkshire and Humberside. Manufacturing's share in the region's GDP fell from 41.7% in 1975 to 35.8% in 1985; the corresponding share in 1983 had been 34.9%.

Income from employment fell sharply from its share of 73.3% of the region's total personal income in 1975 to 64.4% in 1985 - a greater drop in terms of percentage points than in any other region over this period. In 1975 personal disposable income (PDI) per head in the West Midlands was above the national average and second only to that in the South East. Relative PDI per head then declined and reached its lowest level of 91.9% of the UK average in 1983, but then improved to 93.8% and then to 94.4% in 1984 and 1985 respectively.

The West Midlands had low capital expenditure per employee in manufacturing industries in 1984 except in the vehicles, textiles and food, drink and tobacco industries. Foreign owned enterprises accounted for only 8% of capital expenditure in manufacturing, a lower proportion than elsewhere in the UK. The West Midlands benefited from regional assistance to industry for the first time in 1985/86, following the Department of Trade and Industry's revisions of assisted area status as from 29 November 1984.

Exhibit I summarises some of the main facts and figures concerning the West Midlands.

EXHIBIT I

THE WEST MIDLANDS - SOME FACTS AND FIGURES

- 35% of the workforce is involved with manufacturing industry
- 18,000 enterprises providing manufacturing employment = 12% of UK manufacturing concerns
- 23% of the West Midlands workforce in the engineering sector (highest in UK)
- Substantial infrastructure
  - 3,663 manufacturers of metal goods
  - 951 electrical and electronic engineering firms
  - 625 processors of rubber and plastics
  - 560 firms involved in the production of transport-related equipment

  (1985 figures)
- Substantial increase in overseas investment (from a low base) - 582 overseas companies provide employment in the West Midlands for over 62,000 people
- Historically the largest manufacturer of motor vehicles in the UK
- Over 40% of the UK's manufacturing goods (mainly components) are produced in the West Midlands
- Electronics industry emerging as a growth area in the West Midlands
- Ceramics - 80% of UK ceramics industry is located in Staffordshire
- Metal and Chemical Manufacture - 16.3% of all employees for this industry are employed in the West Midlands

B EAST MIDLANDS

The total population of the East Midlands region is about 3.75 million with a workforce of more than 1.6 million.

The mix of industries in the region differs substantially from that of Great Britain, considerably higher proportions of employees being engaged in agriculture and in mining and quarrying, especially in coal mining, in which 22% of the nation's workforce is employed in the region, and a somewhat higher proportion of employees in construction and a markedly smaller one in the rest of the service sector.

The largest manufacturing industry in the region in employment terms is textiles, and the East Midlands employs nearly two-thirds of the nation's labour force in hosiery and knitwear. Mechanical engineering also figures larger than in Great Britain as a whole and is followed in terms of numbers of jobs provided, by clothing and footwear (in footwear the region employs two-fifths of the country's workforce), vehicles (aerospace and cycles) and food, drink and tobacco (food processing and the manufacturing of cigarettes). There are a number of other major industries including metal manufacture and electrical engineering, and a variety of smaller industries. Another feature of the region's labour force is the higher than average proportion of females in manufacturing industries, mainly engaged in textiles, clothing and footwear, food, drink and tobacco.

The rate of unemployment in the region at 8.10.87 stood at 8.9%.

Gross domestic product (GDP) per head in the East Midlands was £4,861 in 1985. This represents a fall in the region's relative position to the fifth highest in the country from being the third highest in the previous year. Manufacturing GDP in the East Midlands fell in its share of the region's GDP from 34.9% in 1975 to 32.8% in 1985 which is a relatively small fall comapred with most other regions during the same period. Income from employment in the region rose by about £600 million from 1984 to 1985 comapred to a rise of almost £1 billion between 1983 and 1984. The share of employment income in the region's total personal income fell from 71.0% in 1975 to 65.3% in 1985. It, however, remained above the national average of 64.3% in 1985. Relative personal disposable income per head fell from 98.8% of the UK average in 1984 to 96.0% of it in 1985.

CHAPTER 4 - CBI REGIONAL REPORTS

Reports from CBI regional offices for the West Midlands and East Midlands are given below. These were collected during October 1987 and are based on the views and impressions of businessmen in the regions, and as such provide an up-to-date picture of the latest developments.

A WEST MIDLANDS

Demand and Output

Demand and future confidence about the future are high in almost all the key industrial sectors of this region. Although demand for agricultural machinery remains depressed with activity in the oil industry flattening out, others report more buoyancy and longer order books than for a very long time. In particular auto-components, metal finishing products, foundry and mining supplies, ceramics, confectionery, adhesives, chemicals, construction and DIY companies are expressing confidence about the next four months. Steel shortages have been highlighted by a number of manufacturers as a problem area, however, with the potential to get worse.

The only factor which could affect the overall picture is concern about the exchange rate of the pound against the dollar. So much of the current optimism is based upon export orders that sensitivity is very high with respect to movements in the levels of exchange rates.

Company Finances

The cash-flow situation has eased but profit margins are tight and getting tighter. Fierce competition, especially from North America, has made this situation even more difficult. The cost of raw materials continues to creep upwards. Many companies in the West Midlands are, however, confident enough about their financial positions to have embarked upon heavy capital investment programmes. The banks in the region, monitoring the current position, reflect this generally healthy picture by reporting that liquidations are very much reduced in number and size, and investment is moving up.

Employment and Pay

Many companies are in the process of addressing the current pay round. In most cases firms are expected to settle somewhere above the rate of inflation and most feel that because of better individual performances over the past 12 months employees' expectations are higher than the award they should actually receive. Companies are tending to tackle these problems in two ways. Firstly, by paying more to get the skills they need and, secondly, by attempting to link any increase over 4.5% to 5% to a productivity or profitability deal. This is new ground to many employers, however, and some do anticipate little difficulty. Linked with all of this, pressure persists to reduce hours in engineering as well as in other sectors. There is, therefore, concern about the knock-on effect of giving way on hours without carefully negotiated productivity deals in return.

There is slightly more evidence of recruitment than of redundancy, but the numbers are small, comapared to the still very high unemployment level in the region. Shortages of skills are becoming more and more acute and those that can now devote more resources to training are facing up to the fact and investing more in this field.

B EAST MIDLANDS

Demand and Output

Most sectors are experiencing considerable buoyancy with strong order books and good growth rates for new business in both home and overseas markets. Confidence remains at a high level with future prospects appearing to indicate even greater degrees of activity during the coming months.

However, some sectors are not without problems - such as the capital equipment sector who are facing continued difficulty in financing exports to Africa and the Middle East; the building and construction industries experiencing shortages of skilled labour and raw materials; and the vehicle leasing sector finding supplies of new vehicles increasingly difficult.

The plight of the agricultural sector, which has suffered from poor harvests due to inclement weather, is well known throughout the country.

Company Finances

Profitability levels continue to improve and the rate of investment for expansion purposes, research and development and for replacement machinery and equipment to cut costs and improve productivity shows noticeable progress.

Employment and Pay

Employment opportunities continue to improve and most sectors report increasing shortages of skilled labour across a wide spectrum. Such areas include general management, engineering and building, computers and general sales, textile machinists and light assembly line operatives.

Pay settlements where reported tend generally to be around 4% to 5% with arrangements to improve earnings by performance related benefits.

CHAPTER 5 - FOREIGN INVESTMENT IN THE MIDLANDS

Traditionally investment by foreign companies has been much lower in the Midlands than in other parts of the UK (see Exhibit IX). However over the past three years the number of overseas companies choosing to set up operations in the region has increased significantly particularly in the West Midlands. This is due in no small part to the success of the West Midlands Industrial Development Association (WMIDA) set up in 1984.

From just a handful of projects in 1984 the number had jumped to 72 in the last financial year, generating capital investment of nearly £160m and creating more than 4,730 jobs. And a similar pace of growth is being established this year.

Total investment from foreign companies in the 3-year period to early 1987 was about £648m.

Government figures for the UK as a whole show the West Midlands' 72 inward investment projects accounted for more than one in five of the 1986 total of 321 (comapred to 1983 when it amounted to only 5% of the UK total). The East Midlands, by comparison gained only 12 projects.

Some examples of overseas investment in the West Midlands are the takeover of Dunlop tyres by Sumitomo of Japan, the transfer of the French-owned Michelin tyre headquarters from London to Stoke, the decision by Yamazaki to invest £35m to make machine tools at Worcester which would be exported back to Japan.

Germany and Switzerland are the main sources of enquiries to WMIDA. In its latest drive to attract foreign investment, it is focussing attention on the US eastern seaboard.

Some of the most recent developments mentioned by the WMIDA (Dec 1987):

- Three foreign companies are due to move into the Birmingham Business Park in the next few months, two of whom are "internationally-known" electronics companies (their names were not disclosed).

- The BBC Technical Department is about to become the first resident of the Warwick Technology Park. It is moving 300 staff from London. (This park is located one mile from the proposed M40 motorway.)

CHAPTER 6 - THE MOTOR INDUSTRY IN THE MIDLANDS

Car manufacturing has long been one of the most important industries in the Midlands. The future appears now to be optimistic as car production is forecast to continue to rise. The current situation and future prospects for the leading companies are discussed below.

The Austin Rover operation is particularly important to the Midlands. Its production this year (1987) will be significantly up on last year, partly because of the improved performance in export markets. Austin Rover's suppliers should benefit not only from increased volume but also fromthe company's initiative to improve relationships with suppliers. According to Andy Barr, Austin Rover's managing director, operations: "We aim to give suppliers confidence in the future, confidence to press ahead with research and development, new investment and the introduction of advanced technology".

Austin Rover insist that the UK content of materials purchased - currently 87%, worth more than £800m a year - will be maintained at a very high level.

A boost is also being given to output levels by the two Midlands-based car markers, Jaguar and Peugeot Talbot, both of which are back on the success trail.

Sir John Egan, chairman of Jaguar, has just revealed plans to spend £1bn over the next six years to improve and expand factories in Coventry. The company is also prepared to spend an extra £50m a year on research and development.

Output in 1987 is scheduled to rise to 48,000 cars, more than treble the 14,000 of just five years asgo. The target next year is 55,000 climbing to more than 100,000 a year by the mid 1990's.

Jaguar now claims to be the biggest employer in the Coventry area with 12,300 workers, having created more than 5,000 jobs since 1981. There will be a continuing build up of the labour force to around 12,750 by the end of the year but beyond that most of the increased output is projected to come from automation.

Dramatic productivity and quality improvements have also been the key to turnround achieved at Peugeot Talbot by chief executive, Mr Geoffrey Whalen.

He says of the commitment of Peugeot, of France, which acquired the UK subsidiary from Chrysler for a nominal 1 US Dollar in 1979, is demonstrated by the £20m investment now underway to build a new car at the Ryton assembly plant, Coventry.

The new investment was prompted by the success of the £30m committed to Coventry for the introduction of the Peugeot 309 model which has made successful inroads in the UK market since its launch less than 18 months ago.

Land Rover is currently taking on 600 workers to boost employment at its Solihull factory, Birmingham, to 7,400. The aim is to raise output about 20% this year to cope with a sharp rise in exports.

Massey Ferguson the Coventry-based tractor manufacturer, has had to cope not just with a decline in third world markets but also with a protracted downturn in demand from advanced countries including the US.

The company is currently seeking to implement plans which involve shedding 1,000 jobs and what it describes as a complete change in company culture. The Coventry factory, which a decade ago turned out 80,000 to 90,000 tractors a year with a workforce of 6,500 is being reorganised to produce half that number with only 2,500 workers.

Massey Ferguson claims to be the biggest manufacturer of tractors with more than 18% of worldwide sales last year (1986). The changes are intended to remain competitive and improve market performance.

Exhibit II gives a stastical overview of the motor industry.

Exhibit III summarises main investments by motor manufacturers.

EXHIBIT II

THE WEST MIDLANDS MOTOR MANUFACTURING INDUSTRY

Total Employment		Net Capital Expenditure		Net Output		Gross Value Added	
Thousand	% of UK	£million	% of UK	£million	% of UK	£million	% of UK
49.3	32.2	175.8	32.9	1,071.6	31.2	847.9	31.5

Note: The above figures are from 1985 (latest available statistics).

EXHIBIT III

MOTOR INDUSTRY INVESTMENT

AUSTIN ROVER	- buys £800m worth of materials in UK annually.
JAGUAR	- plans to spend £1bn over next six years to improve and expand factories in Coventry
	- prepared to spend an extra £50m a year on R & D.
PEUGOT TALBOT	- spent £30m for introduction of 309 model
	- £20m investment now underway to build a new car in Coventry.
LAND ROVER	- taking on 600 workers; output up 20% in 1987.

APPENDICES

Appendix I shows the breakdown by industry groups of gross domestic product for the East and West Midlands in 1984 and 1985. The high percentage corresponding to manufacturing is worth noting, as is the upward tendancy of this figure. As can be seen, metal goods engineering and vehicles are particularly important in the West Midlands. "Other" manufacturing (particularly textiles) are significant in the East Midlands. (Unfortunately the figures for the three sub-sectors of manufacturing are not available for 1985.) Looking at the totals, it is interesting to note that the West Midlands GDP increased by 11% between 1984 and 1985, while that of the East Midlands rose by only 6%.

The number of manufacturing units in the Midlands is shown in Appendix II. In terms of both number of employees and number of local units, the West Midlands is about 40% bigger than the East Midlands. The biggest difference between the two is in the companies with more than 1,000 employees, where the West Midlands is over twice as strong. For medium-sized companies (100 to 1,000 employees) there is little difference between the East and West Midlands.

Appendix III shows the importance of the East and West Midlands manufacturing sector comapred to the other regions in the UK.

The figures in Appendix IV for capital expenditure in manufacturing are unfortunately from 1984, the most recent ones available. Again the importance of metal goods and vehicles in the West Midlands can be seen. The overall capital expenditure per employee was well below the national average (this situation will probably have changed however since 1984). It is interesting to note the high level of expenditure per employee for vehicles in the West Midlands (and the very low corresponding figure in the East Midlands).

Appendices V to IX provide general industry and economic information which is self-explanatory. Appendix X shows a map of the Midlands area of particular interest in this study.

APPENDIX I

GROSS DOMESTIC PRODUCT BY INDUSTRY GROUPS

	East Midlands		West Midlands	
	1984	1985	1984	1985
Agriculture, forestry & fishing	543	536	432	428
Energy and water supply	1,727	1,585	1,020	1,159
Manufacturing	5,772(32.3%)	6,228(32.9%)	7,730(35.2%)	8,696(35.8%)
Minerals, metals & chemicals	943(5.3%)	-	1,273(5.8%)	-
Metal good, engineering & vehicles	2,013(11.3%)	-	4,419(20.1%)	-
Other manufacturing industries	2,815(15.8%)	-	2,038(9.3%)	-
Construction	1,084	1,093	1,351	1,431
Distribution, hotels & catering; repairs	2,208	2,524	2,942	3,478
Transport & communication	1,074	1,146	1,222	1,332
Financial & business services, etc	1,626	1,781	2,457	2,830
Ownership of dwellings	1,029	1,107	1,516	1,632
Public administration & defence	1,197	1,204	1,435	1,538
Education & health services	1,436	1,498	1,774	1,857
Other services	788	874	1,031	1,134
Adjustment for financial services	-618	-732	-961	-1,208
Total	17,865	18,945	21,950	24,306

Source: Central Statistics Office

APPENDIX II

LOCAL MANUFACTURING UNITS (1986)

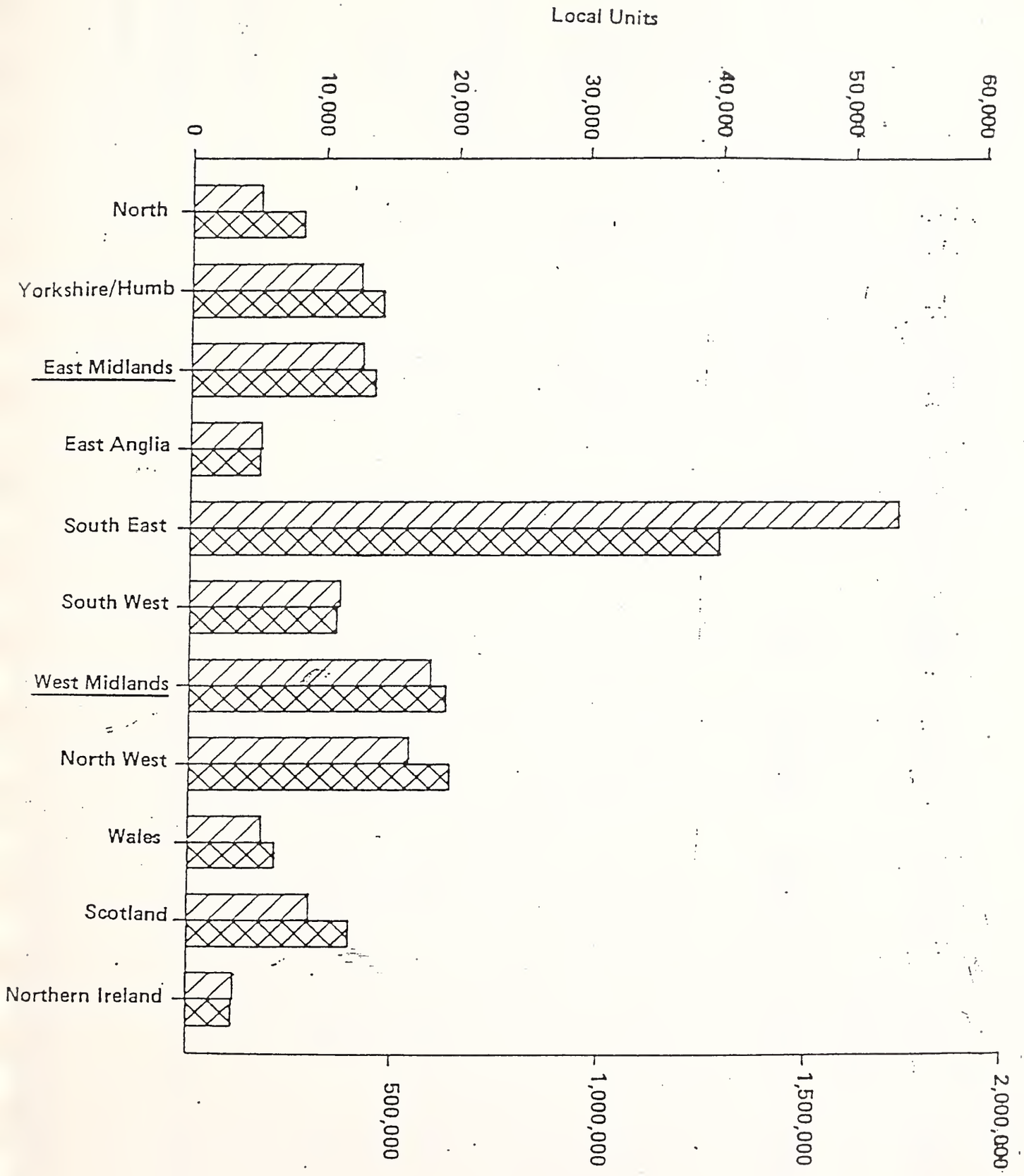
	Local Units	Employment
East Midlands	12,908	439,502
West Midlands	18,193	613,056

Breakdown by Size of Unit

	East Midlands		West Midlands	
Unit Size	Local Units	Employment	Local Units	Employment
1 - 9	8,066	26,071	11,719	38,208
10 - 19	1,717	23,524	2,327	32,147
20 - 49	1,409	43,559	1,958	61,011
50 - 99	733	52,174	982	67,719
100 - 199	508	70,262	604	84,044
200 - 499	348	102,028	376	112,771
500 - 999	94	62,079	122	79,960
>1,000	33	59,805	65	137,196
	12,908	439,502	18,153	613,056

Source DTI

APPENDIX III



LOCAL UNITS BY REGION (MANUFACTURING) 1986

APPENDIX IV

CAPITAL EXPENDITURE IN MANUFACTURING[1] (1984)

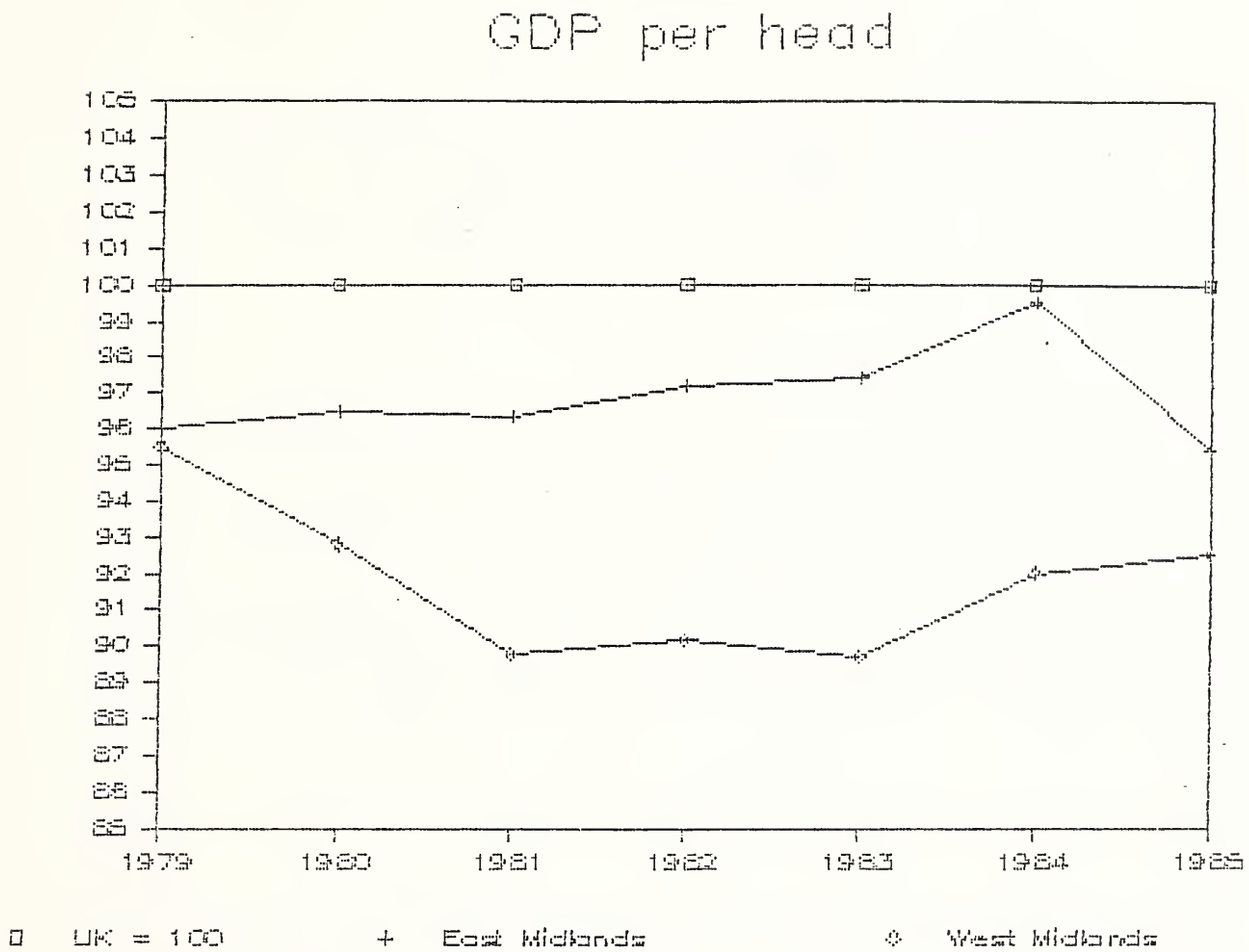
[2]Class Industry Groups	Manufacturing Divisions 2-4	Mining* Classes 21-24	Chemicals Class 25	Metal Goods Class 31	Engineering Classes 32-34,37	Vehicles Classes 35-36	Food, Drink & Tobacco Classes 41-42	Textiles Classes 26,43-45	Timber & Other Manufacturing Classes 46-49
£ MILLION									
United Kingdom	7,589.3	818.7	905.6	319.6	1,698.4	901.3	1,255.2	359.5	1,331.1
East Midlands	557.0	66.0	48.0	29.5	119.6	15.2	113.5	65.2	100.1
West Midlands	842.2	131.0	23.0	91.3	169.0	210.9	95.9	19.6	101.5
£ PER EMPLOYEE									
United Kindgom	1,500	2,145	3,139	945	1,277	1,552	2,048	619	1,424
East Midlands	1,224	2,151	2,525	1,045	1,201	425	2,212	525	1,511
West Midlands	1,323	1,538	1,769	830	1,037	2,159	1,952	579	1,195

* This column corresponds to: Extraction and manufacture of metals; other mineral products.

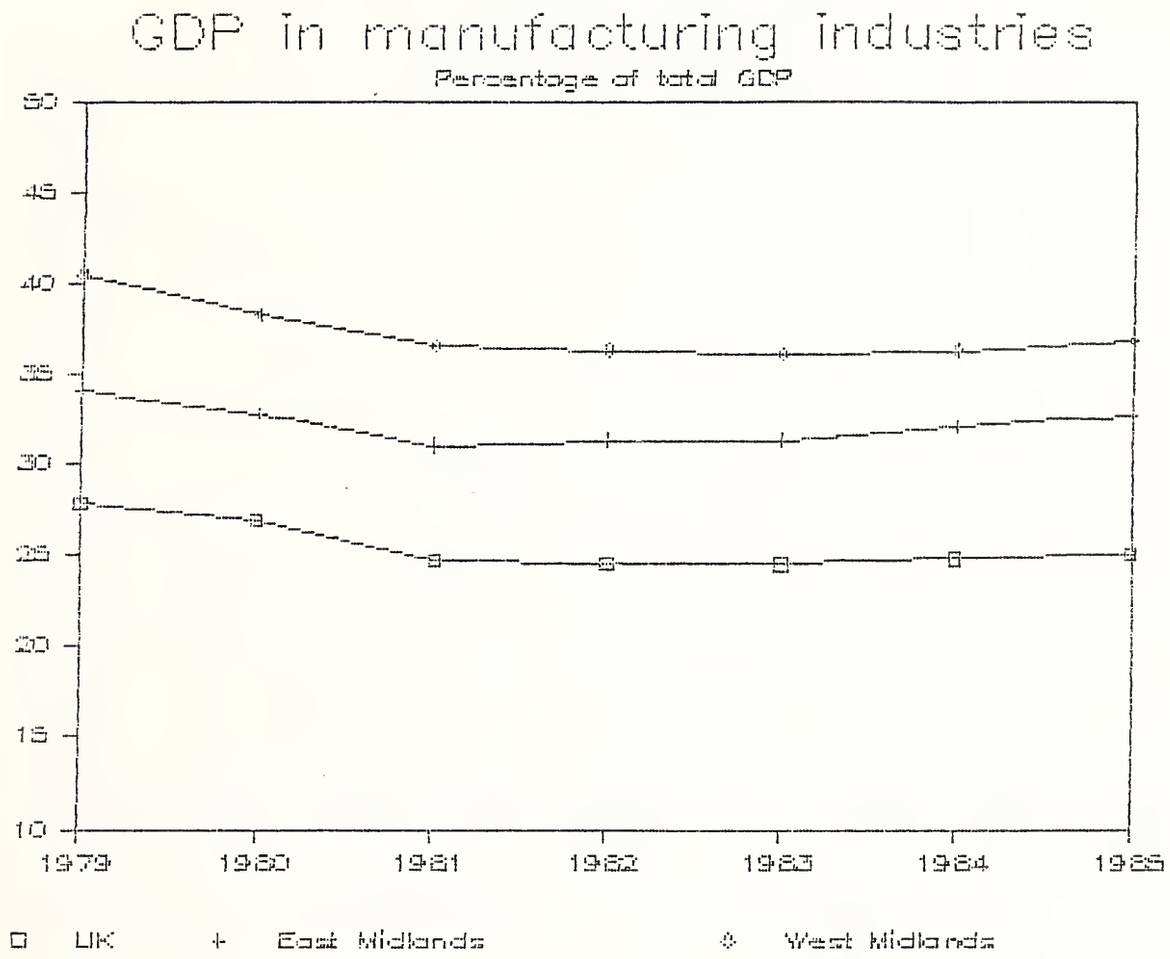
[1] Net Capital expenditure: new building work plus acquisitions less disposal of land and existing buildings, plant and machinery and vehicles.

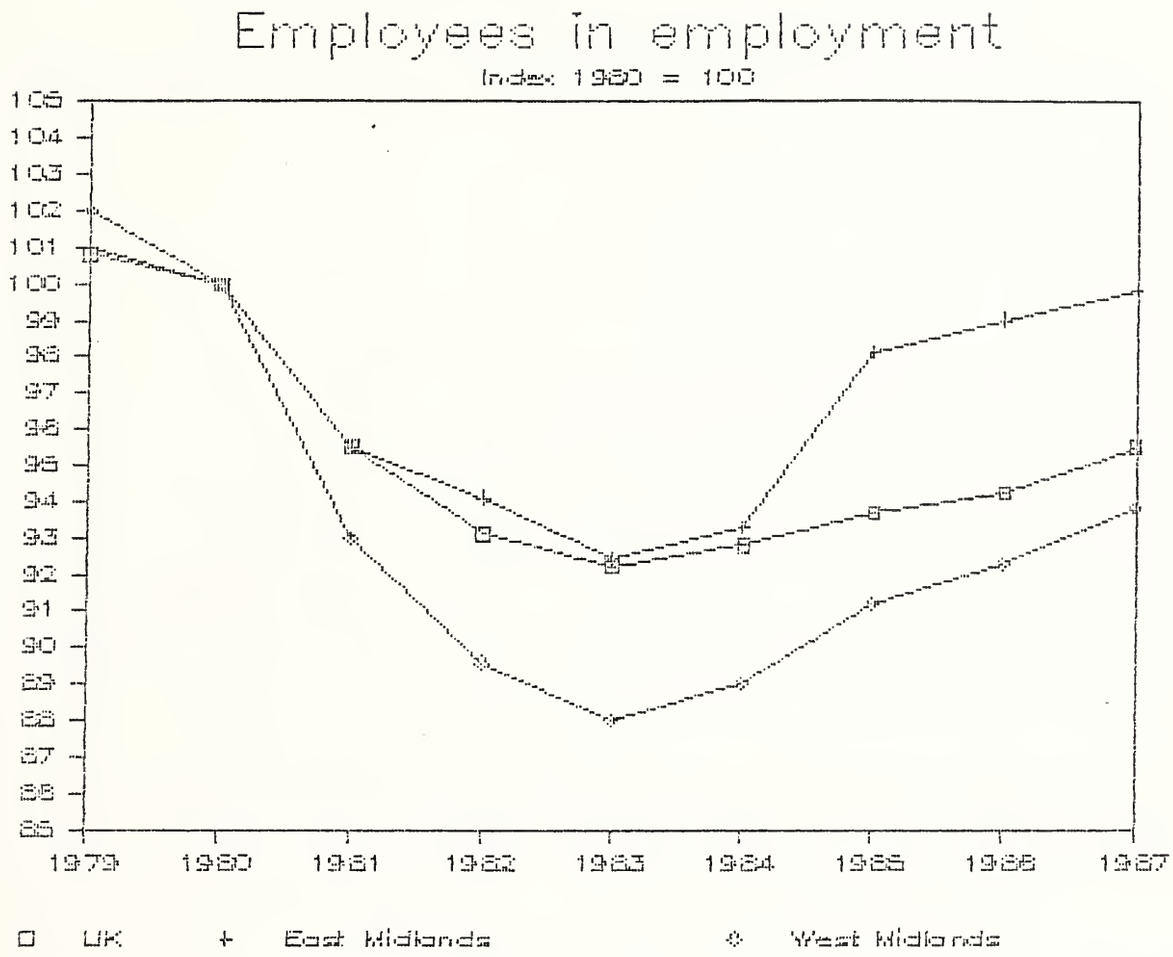
[2] Standard Industrial Classification.

Source: Business Statistics Office
Annual Census of Production

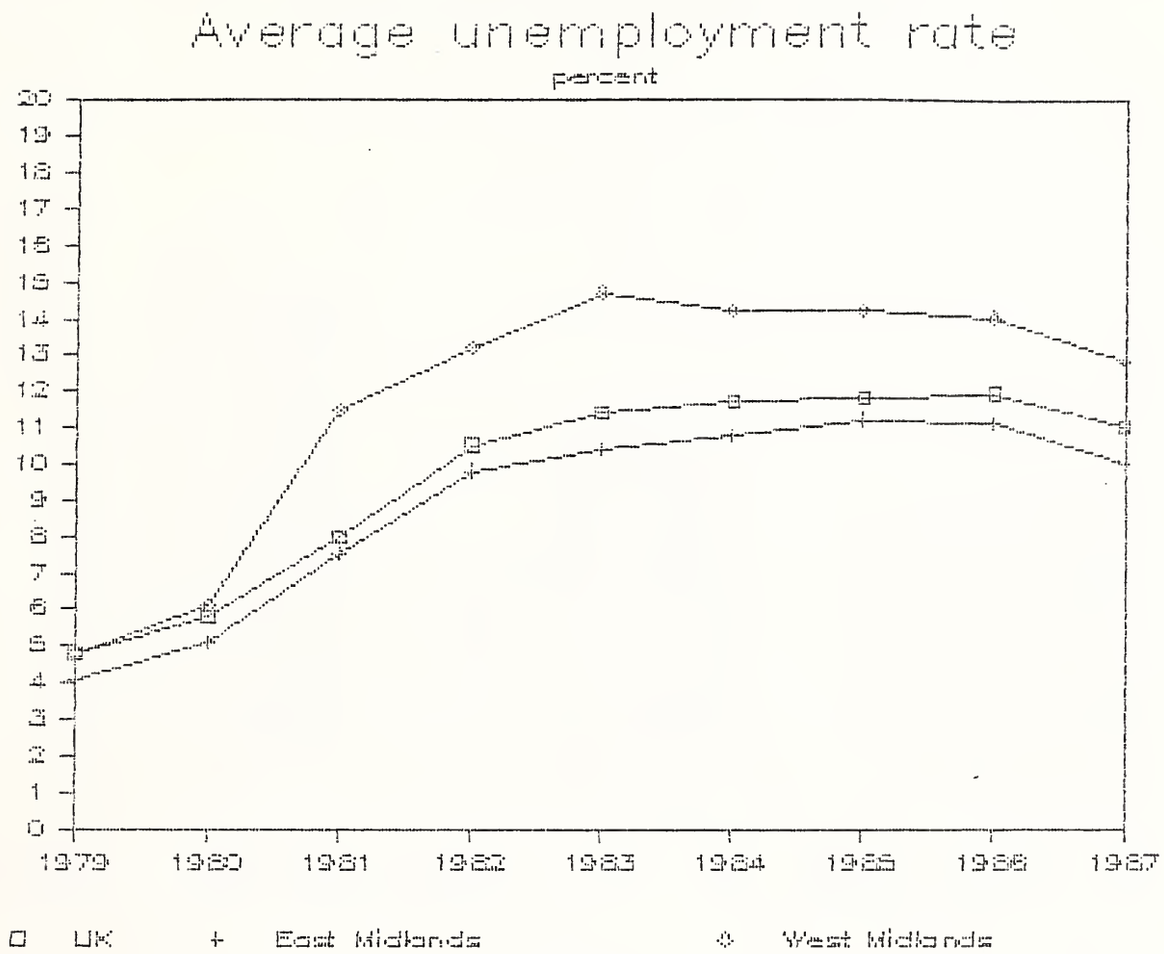

GDP per head
105
104
103
102
101
100
99
98
97
96
95
94
93
92
91
90
89
88
87
86
85
1979
1980
1981
1982
1983
1984
1985
□ UK = 100
+ East Midlands
◇ West Midlands

APPENDIX VI

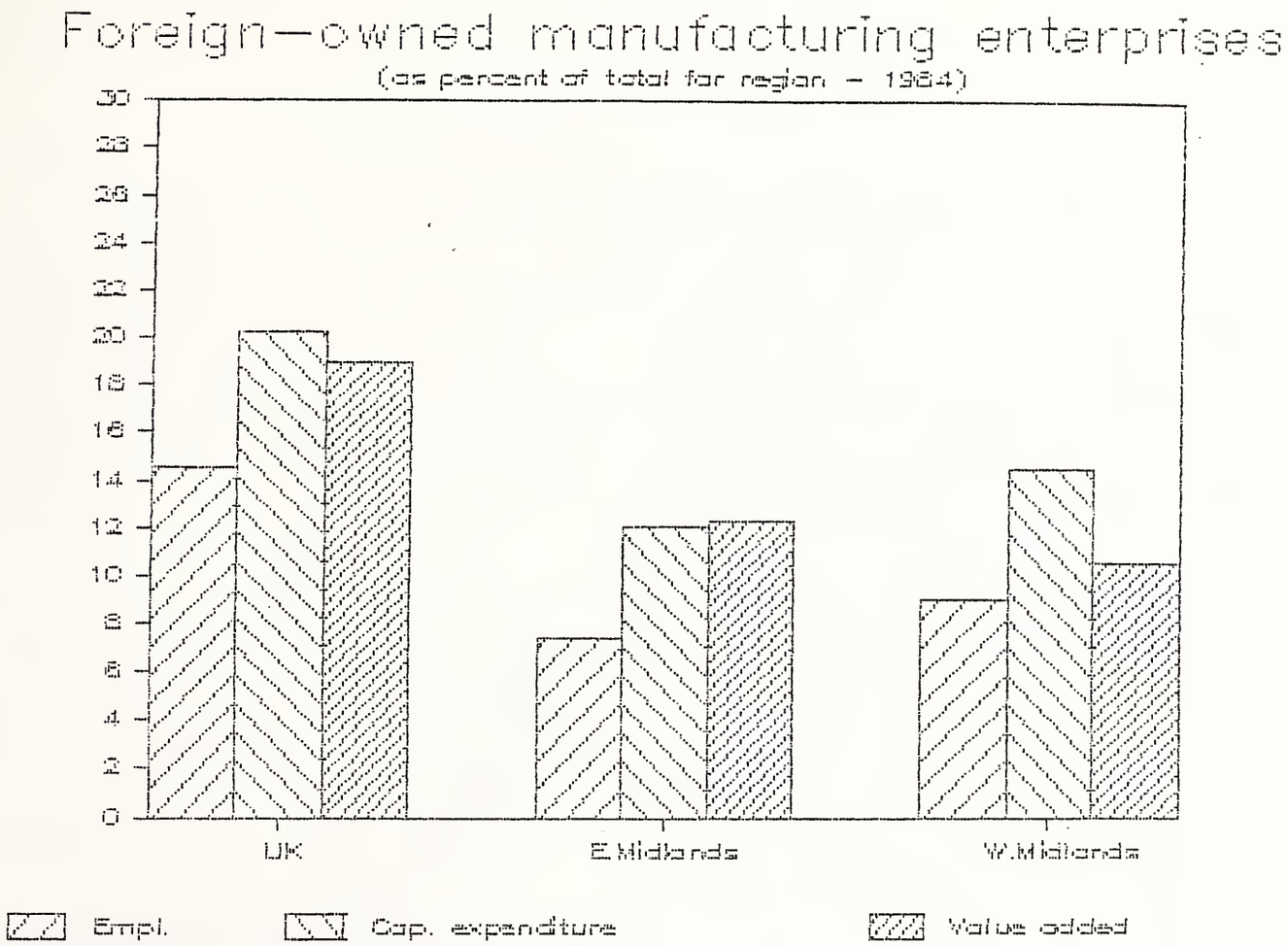

GDP in manufacturing industries
Percentage of total GDP
50
45
40
35
30
25
20
15
10
1979
1980
1981
1982
1983
1984
1985
UK
East Midlands
West Midlands


Employees in employment
Index 1980 = 100
105
104
103
102
101
100
99
98
97
96
95
94
93
92
91
90
89
88
87
86
1979
1980
1981
1982
1983
1984
1985
1986
1987
UK
East Midlands
West Midlands

APPENDIX VIII

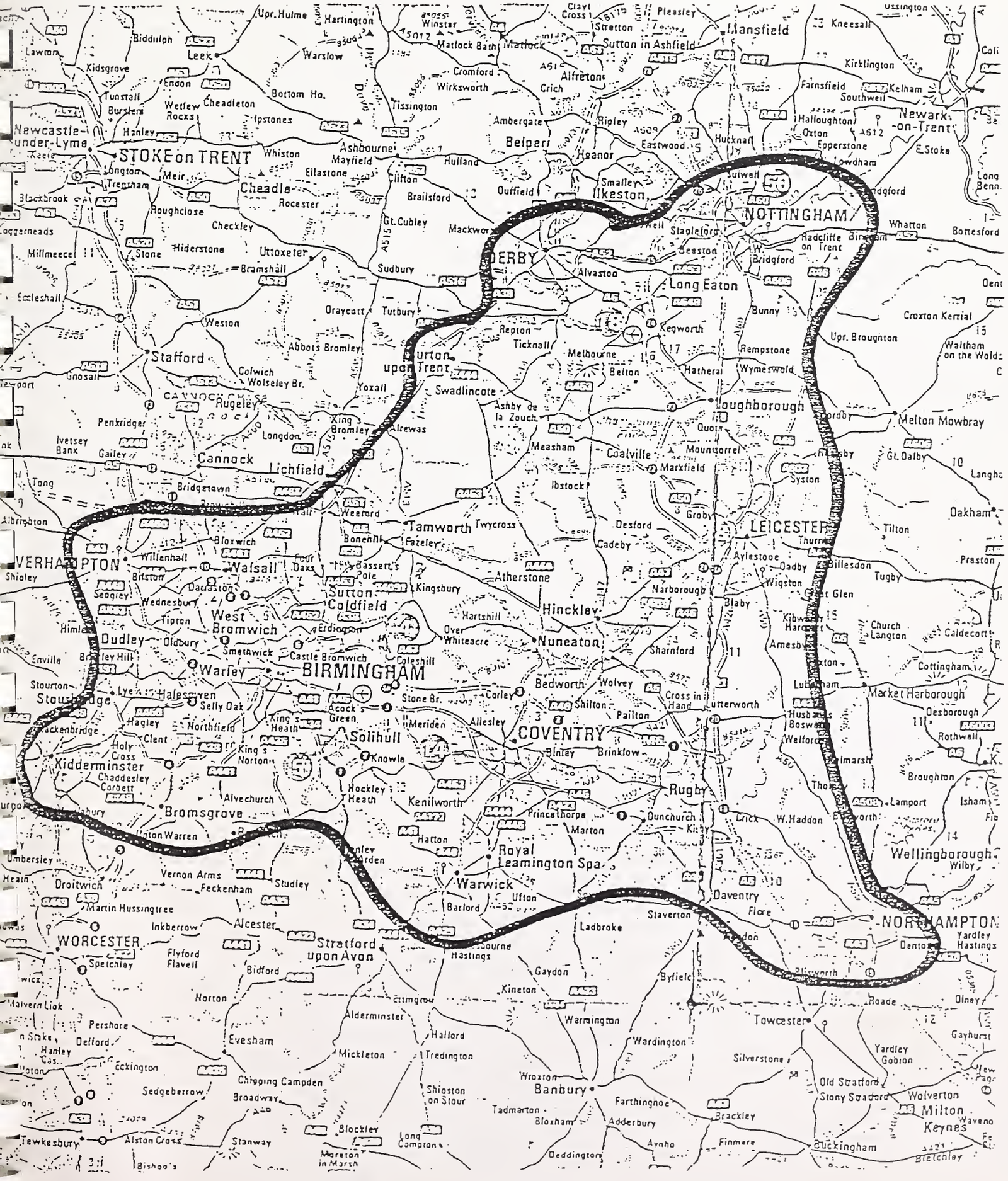


APPENDIX IX


Foreign—owned manufacturing enterprises
(as percent of total for region - 1984)
0
2
4
6
8
10
12
14
16
18
20
22
24
26
28
30
UK
E.Midlands
W.Midlands
Empl.
Cap. expenditure
Value added

APPENDIX X

THE MIDLANDS


STOKE on TRENT
Newcastle-under-Lyme
Stafford
Cannock
Lichfield
Tamworth
Burton upon Trent
DERBY
Ashbourne
Belper
Cheadle
Uttoxeter
Ilkeston
Long Eaton
Mansfield
Sutton in Ashfield
Newark-on-Trent
NOTTINGHAM
Loughborough
Melton Mowbray
LEICESTER
Coalville
Hinckley
Nuneaton
Atherstone
Swadlincote
Ashby de la Zouch
Rugeley
Walsall
WOLVERHAMPTON
Dudley
West Bromwich
Sutton Coldfield
BIRMINGHAM
Warley
Halesowen
Stourbridge
Kidderminster
Bromsgrove
Redditch
Solihull
COVENTRY
Rugby
Kenilworth
Royal Leamington Spa
Warwick
Daventry
NORTHAMPTON
Wellingborough
Market Harborough
Oakham
Droitwich
WORCESTER
Stratford upon Avon
Evesham
Alcester
Studley
Henley in Arden
Banbury
Towcester
Silverstone
Milton Keynes
Buckingham
Aylesbury
Tewkesbury
Chipping Campden
Broadway
Sedgeberrow
Alderminster
Shipston on Stour
Wroxton
Bicester
Brackley
Adderbury
Deddington
Aynho
Finmere
Wardington
Warmington
Gaydon
Kineton
Ladbroke
Byfield
Staverton
Flore
Weedon
Hatton
Marton
Princethorpe
Dunchurch
Brinklow
Binley
Allesley
Meriden
Knowle
Hockley Heath
Kenilworth
Corley
Bedworth
Nuneaton
Hartshill
Whitacre
Stone Br.
Acock's Green
Castle Bromwich
Smethwick
Oldbury
Tipton
Wednesbury
Darlaston
Bloxwich
Willenhall
Bilston
Wolverhampton
Shifnal
Albrighton
Tong
Bridgetown
Gailey
Ivetsey Bank
Penkridge
Longdon
King's Bromley
Alrewas
Colwich
Wolseley Br.
Yoxall
Gnosall
Newport
Loggerheads
Blackbrook
Millmeece
Eccleshall
Hilderstone
Stone
Roughclose
Checkley
Rocester
Tean
Ellastone
Mayfield
Ashbourne
Hulland
Clifton
Brailsford
Ouffield
Gt. Cubley
Mackworth
Sudbury
Bramshall
Uttoxeter
Weston
Abbots Bromley
Craycott
Tutbury
Repton
Ticknall
Melbourne
Belton
Hatherat
Wymeswold
Rempstone
Bunny
Keyworth
Stapleford
Beeston
Alvaston
Radcliffe on Trent
Bridgford
Wilford
Clifton
Ruddington
Wheatley
Gotham
Kingston
Normanton
Cropwell Bishop
Bingham
Aslockton
Whatton
Bottesford
Muston
Harby
Long Bennington
Newark-on-Trent
Southwell
Farnsfield
Kelham
Kirklington
Halloughton
Ossington
Kneesall
Epperstone
Lowdham
Gedling
Carlton
Arnold
Calverton
Woodborough
Lambley
Papplewick
Linby
Hucknall
Eastwood
Langley Mill
Heanor
Ripley
Ambergate
Belper
Crich
Alfreton
Matlock
Matlock Bath
Winster
Cromford
Wirksworth
Tissington
Ipstones
Bottom Ho.
Cheadleton
Wetley Rocks
Endon
Kidsgrove
Leek
Warslow
Biddulph
Lawton
Hartington
Upr. Hulme
Clayt Cross
Pleasley
Stretton
Croxton Kerrial
Upr. Broughton
Waltham on the Wolds
Melton Mowbray
Gt. Dalby
Langham
Oakham
Tilton
Thurnby
Aylestone
Oadby
Wigston
Billesdon
Tugby
Glen
Church Langton
Caldecott
Cottingham
Lubenham
Market Harborough
Oesborough
Rothwell
Husbands Boswell
Welford
Lutterworth
Cross in Hand
Pailton
Shilton
Wolvey
Sharnford
Narborough
Blaby
Kibworth Harcourt
Amesbury
Sutton
Groby
Desford
Cadeby
Markfield
Ibstock
Measham
Quorn
Mountsorrel
Syston
Barrow
Twycross
Fazeley
Bonehill
Four Oaks
Bassett's Pole
Kingsbury
Seagley
Hamstall Ridware
Rugeley
Yoxall
Swadlincote
Ashby de la Zouch
Coalville
Markfield
Groby
Desford
Cade